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The political theory of the Latin American independence movement

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The Political Theory of the Latin American Independence Movement

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Abstract

This project explores the historical context from which four Latin American political theorists emerged in the 19th century and analyzes the extent to which they promoted the liberal ideal of equality in the governments they worked to establish. Mariano Moreno, José de San Martín, Simón Bolívar, and Agustín de Iturbide played central roles in the Latin American independence movement and the establishment of government institutions in the years that followed. I demonstrate that each theorist neglected to include large swaths of society in their discussions of equality while advocating for systems of governance from which they would personally benefit.

Introduction

In order to understand the political theory of the prominent voices who brought about the liberation of almost all of Spain's colonies in Latin America, one must first understand the context from which these minds emerged. Through the course of this literature review, I will examine the political, social, and economic contexts of the period leading up to and during the independence movement which occurred in the early 1800s.

To begin, I will look at the political context of the Spanish colonies, beginning with their establishment under Queen Isabel I (1451-1504) and King Fernando II (1452-1516). I will also outline the major causes of the decline of the Spanish empire in the Americas. The reign of Spanish Crown ended for several reasons: the Crown's attempts to centralize control coincided with the Enlightenment period's dissent against absolute regimes; the creoles' identity crisis as they felt they were relegated to the status of second-class citizens in a continent that they felt belonged to them as the decedents of the conquistadors; and the exploitative economic policies that kept the colonies dependent upon the Crown.

I. Political context

The Spanish Empire in the Americas spanned from Christopher Columbus's arrival in the Caribbean in late 1492 until the last colonies, Cuba and Puerto Rico, won their independence in 1898. The majority of the independence movement occurred in the first half of the nineteenth century, when the vice royalties and general captaincies separated from the Crown.

Queen Isabel and King Fernando II, also called *los Reyes Católicos* (the Catholic Kings), approved Christopher Columbus's expedition to the Indies in 1492. Pope Alexander VI issued a papal bull on May, 4 1493 establishing Spain's dominion over any territories one hundred

leagues west and south of the islands of Azores and Cape Verde (Delaney, 2010). Everything to the east of that dividing line would be reserved for Portugal. The papal bull also granted Spain and Portugal with "full and free power, authority, and jurisdiction of every kind" to colonize in the Americas, convert the indigenous populations, and enslave Africans (Pope Alexander VI, 1493). The Treaty of Tordesillas signed on June 7, 1494 moved the longitudinal dividing line two hundred and seventy leagues west, giving Portugal greater area for colonization (Delaney, 2010). With the Pope's approval, *los Reyes Católicos* were free to colonize and explore the Western Hemisphere – growing their empire into one of the largest the world has ever seen and earning itself the title of "the empire on which the sun never sets".

Los Reyes Católicos were partially motivated by their Catholic faith to search for new people to convert. Queen Isabel's kingdom of Castilla had been ruled by Las Siete Partidas, a common law created under Alfonso X during the thirteenth century. At the heart of the Partidas is a humanist ideology, viewing man as having "a salvable soul" and endowing the monarch with the responsibility to be "bound through his conscience to be the instrument of God's immutable, publicly ascertainable law" (Morse, 1954). As Richard Morse argues in "Toward a Theory of Spanish American Government", Isabel follows in Saint Thomas Aquinas's footsteps by believing the duty of the governing authority is to shape the morals of the people through law. *Los Reyes Católicos* were also motivated by the desire to build an empire that rivaled the Protestant empires and, of course, to acquire wealth and power. King Fernando's rule was more Machiavellian, as Morse describes. "Ferdinand was committed to the shifting, amoral statecraft of competing Christian princes in maintenance and expansion of a domain which, within its Christian context, was diversely composed" (1954). In other words, Fernando was concerned with growing his empire and held little regard for the spiritual welfare of his subjects. The

combination of Isabel and Fernando's political theories resulted in "Spanish conquistadors, colonizers and catechizers [who] carried with them to American shores this dual heritage: medieval and Renaissance, Thomistic and Machiavellian" (Morse, 1954). The ideals of *los Reyes Católicos* in creating a powerful, Catholic empire was the cornerstone on which the Spanish American colonies were founded.

At the height of the Spanish American empire, the Crown had established four vice royalties and two general captaincies stretching from present-day California to the southernmost tip of South America. However, there was a considerable space in time between the first two vice royalties – New Spain and Perú – and the second two vice royalties – New Granada and Río de la Plata. Under the Habsburg crown (the descendants of Isabel and Fernando) New Spain and Perú were established in the mid-sixteenth century. Shortly after the War of Succession (1701-1714) New Granada and Río de la Plata were established. The General Captaincies of Venezuela and Guatemala were founded to secure greater autonomy over their military and administrative powers as they faced foreign threats from the Caribbean and significant economic growth. For geographical context, New Spain was established in 1531 and its capital city was México City, which spanned most of present day México and Central America. Perú, established in 1542, stretched along the Pacific coast of the South American continent, and its capital city was Lima. The General Captaincy of Guatemala was established in 1609 with present-day Guatemala City as its capital. New Granada was established in 1717 with Bogotá as the capital; it included present-day Colombia, Venezuela, and Ecuador. Río de la Plata was the last vice royalty to be established in 1776 with Buenos Aires as its capital; this viceroyalty encompassed the southern cone of South America. Lastly, in 1777 the General Captaincy of Venezuela was established after separating from New Granada.

The viceroyalties mimicked the structure of the Spanish Crown, which allowed the colonies to enjoy a degree of freedom. Each of the viceroyalties was further divided into *audiencias*, or governing bodies which were comprised of local authorities. Antonio de la Cova explains in his article, "Colonial Administration in Latin America," that while the viceroyalties were inferior to the Spanish Crown, in practice the local authorities had greater ability to govern their local areas. "Viceregal power was characterized by a certain amount of independence from royal control, mainly because of distance and difficult communications with the mother country." Just as the viceroyalties struggled to follow and enforce the decrees from the Spanish Crown, the most distant regions of viceroyalties enjoyed the greatest autonomy. The first audiencia was in Mexico City with a royal judicial body of four judges who were also the executive and legislative authorities. The powers were distributed between a viceroy who received the executive and legislative powers, and the audiencia maintained judicial powers. As the empire grew, the political structure advanced and resulted in "a colonial administrative apparatus and bureaucracy" that "paralleled the economic reorganization" (Cova, 1997). The audiencias were subdivided into provinces and then municipalities, and each layer was governed by the most prominent citizens. At the top of the viceroyalties was a viceroy, whose responsibilities were numerous, and included reporting to the Council of the Indies which was the colonial governing body in Spain.

The authority of the viceroyalties was diminished following the Spain's internal War of Succession, which ended in 1714. The Habsburg family was replaced by the Bourbons, who were drastically different in their ruling style. The Bourbons hailed from France, and instituted reforms that limited the freedom of the federated kingdoms by overseeing the colonial commerce and governance. As Jaime Rodriguez writes in *The Independence of Spanish America*, the

French Bourbons rejected the federated kingdom political structure and opted for more centralized power (1998).

The Spanish American political empire began to collapse for various political reasons. One commonly held reason is that the oppressive and absolutist nature of the Bourbon empire became insufferable as people stopped seeing the Crown as inerrant. Violent treatment of indigenous people, the expulsion of the Jesuits, and the relegation of creoles as second-class citizens contributed to the distrust and resentment towards an increasingly centralized regime. The early Spanish Empire boasted a united identity—one Catholic faith, one Castilian language, and one political power derived from God. However, fractures appeared in the image as prominent members of society drew attention to the violence against indigenous peoples and the ideas of the Enlightenment permeated society.

One such blemish was the revelation of the violent methods used to convert and personally profit from the indigenous people; these methods were revealed through Fray Bartolomé de las Casas's letters to King Carlos V between 1515 and 1566. Fray Bartolomé de las Casas was born in Sevilla, Spain, and later moved to Hispaniola (present-day Haiti and the Dominican Republic) in 1502 as a land and slave owner. He became a priest in 1510 after partaking in the Spanish's invasion of Cuba and witnessing the European approach to native affairs (Anthony, 2015). De las Casas is credited as an early promoter of modern-day human rights, as he promoted the liberation of all slaves and the self-governance of indigenous groups (Anthony, 2015). In the Bishop of Chiapas's letters, the atrocities being done in the name of God were detailed at great length. "Christians have slain and destroyed so many and such infinite numbers of souls…simply to get, as their ultimate end, the Indian's gold of them, and to stuff themselves with riches in a few days, and to raise themselves to high estates" (Casas, 1552). De

las Casas was among the most well-known for advocating on behalf of the indigenous people, and his letters led to the King's statement calling for an end to the unjust enslavement of indigenous people. "We ordain and command that the Audiencias having first summoned the parties to their presence…so that the truth may be ascertained, speedily set the said Indians at liberty unless the persons who hold them for slaves show title why they should hold and possess them legitimately. And in order that in default of persons to solicit the aforesaid, the Indians may not remain in slavery unjustly," (Stevens, 1893). De las Casas based his ideas on the writings of Thomas Aquinas and Aristotle, and Spain would have been familiar with self-governance from the Muslim legal practice of *dhimmi* which gives non-Muslims the use of their own legal system (Anthony, 2015). It is worth noting, that while the New Laws are remarkable for their recognition of indigenous people as rights holders, they were suspended when the unpopular laws led to a civil war in Perú and the viceroy was assassinated. De la Casas's letters were published more than 250 years prior to the independence movement, yet his accounts had a significant influence on the independence movement by diminishing the luster of the Crown in the eyes of many people.

The oppressive nature of the empire was not limited to the treatment of indigenous people. After centuries of rule under the Habsburg dynasty with little oversight, the abrupt centralization under the Bourbons quickly became insufferable, "The image of the Spanish Empire changed, however, not because the Empire itself changed, but very largely because it failed to" (Pagden, 1990). Under the Bourbons, the well-liked yet liberal Jesuits were expelled from the colonies which resulted in public outcry. Despite having been employed by the Spanish crown to civilize the native populations through their conversion and education, they were expelled from the colonies in 1767 for what was perceived as too fierce a loyalty to the papacy

(Klaiber, 2004). In Leslie Bethell's *The Cambridge History of Latin America*, he states, "Spanish Americans regarded the expulsion as an act of despotism, a direct attack upon their compatriots in their own countries… Their life-long exile was a cause of great resentment not only among themselves but also among the families and sympathisers whom they left behind" (1997, p.10). All Jesuit schools, missionaries, and land were seized, and any non-priests had to find new professions. Some went on to write the history of indigenous groups, while in 1792 Juan Pablo Viscardo y Guzmán wrote an open letter to all creoles which scholars compare to Thomas Paine's *Common Sense* (Klaiber, 2004). Their expulsion came to be seen as "an attack on the semi-independence of the Jesuits and an assertion of imperial control" (Bethell, 1997, p.10). The crown was tightening its grip on the colonies to maintain control, and the Jesuits posed a threat to their absolutism; therefore, they were no longer welcome.

At the center of the Bourbon's mission was to ensure the *peninsulares'* control over the colonies which was a further point of contention between the creoles and *peninsulares*. The Bourbons' attempt to centralize power extended further yet. Women in the colonies faced heightened limitations, trade was regulated and ships were registered, and imposed Intendants worked to implement the king's will by bypassing the colonial government structures. The Bourbons' reformations of the colonies and their attempts to take power away from the creoles resulted in the cleavage within society.

This all overlapped with the invasion of Napoleonic forces in Spain which caused an intermission in the Bourbon's reign over the colonies. Napoleon Bonaparte named his brother, José, as the king of Spain, making the colonies dependent upon a country that for all intents and purposes, no longer existed. Spain eventually resumed control of its territories, but not without losing confidence and respect in the eyes of their subjects, "For Spanish America the Thomistic

keystone and been withdrawn. Efforts to supplant it, on a continental basis or even within regional blocs, were in vain" (Morse, 1954). Queen Isabel's Thomistic intentions of leading and molding morality into her empire were lost with its conquest by Napoleon. Add in that the world's understanding of political authority was rapidly and radically changing – the Crown's authority was subverted.

The ideas of the Enlightenment contributed to the political upheaval, as the recognized source of power became the consent of the governed. Philosophers were questioning the legitimacy of divine right rulers, who claimed their authority was endowed by a supreme power. Ideological changes stemmed from the French Philosophes who "helped to consolidate independentist views through Latin America" (Garcia, 2018). Theorists like Montesquieu and Rousseau, "possessed in common, in varying degrees, belief in reason as the means by which to solve human problems… The Philosophes looked to nature as the source of justice and virtue. They all attacked religious fanaticism and dogma in order to end ignorance and superstition" (Curtis, 2008, p. 416-417). The creoles who became the leading the political theorists of the Latin American independence movement, had access to their works and were attracted to their compelling ideas.

John Locke (1632-1704) preceded Montesquieu and Rousseau when he wrote his *First and Second Treatises* which describe the government as a governing body responsible to and for whole community. He attacked divine right and hereditary power in his *First Treatise*. He claimed that the state of nature was based on rationality, which strays from Thomas Hobbes's grim state of nature. Unlike Hobbes, Locke's State of Nature is governed by a natural law which recognizes the rights to life, liberty, and property, but that law is not sufficiently enforced. Therefore, political society, according to Locke, should secure those rights while also bringing

about certain benefits to people. “Civil government is the proper remedy for the inconveniences of the state of nature, which must certainly be great where men may be judges in their own case…Much better than absolute monarchy is the state of nature, wherein men are not bound to submit to the unjust will of another; and if he that judges, judges amiss in his own or any other case, he is answerable for it to the rest of mankind,” (Curtis, 2008, p. 373). For Locke, any absolute government—monarchy or otherwise—is a worse option than the state of nature. Locke defines tyranny as “exercise of power beyond right” meaning any government that oversteps its defined limits and ceases to meet the needs of the people may be replaced. For Locke, there was natural equality in the state of nature where no one had any more than another; it is outside the state of nature where people develop inequalities with the emergence of greed and conflicts over land holdings. While governments do not ensure equal land distribution or wealth, it does protect property rights. Men retain the right to dissolve of any illegitimate system of governance, as the state of nature would be preferable to the unjust will of a monarch.

Montesquieu’s *L’Esprit des Lois* discussed the relativity of law, arguing that “there is no one solution or regime applicable to all countries, that there was more than one way of being civilized, that the regime of a country depended on time, physical conditions, climate and traditions of each country” (Curtis, 2008, p. 426). Essentially, Montesquieu surmised that the political regime must be suited for the people and place it governs. The so-called “spirit” of the laws, ought to be in proportion to the regime type. Regimes are not universal, nor does one size fit all; according to Montesquieu, they must be in accordance with their context. He also wrote of the nature of laws, “A government may be so constituted, as no man shall be compelled to do things to which the law does not oblige him, nor forced to abstain from things which the law permits” (Curtis, 2008, 434). For Montesquieu, laws are made to prevent abuses of power and

infringements on the right to freedom. He also expanded on Locke's ideas on the types of governmental powers: legislative, judicial, and executive, along with the idea that "power should be a check to power" (Curtis, 2008, p. 434). His ideas deeply inspired the US Constitution and later the French Revolution which were in turn, catalysts for the Latin American independence movement (Curtis, 2008, p. 419).

Similarly, Jean Jacques Rousseau's ideas on the social contract, the idea that citizens consent to being governed and therefore legitimize an authority, were influential thoughts during this time period. The terms of the social contract according to Rousseau are as follows, "Each of us puts his person and all his power in common under the supreme direction of the general will, and, in our corporate capacity, we receive each member as an indivisible part of the whole" (Curtis, 2008, p.19). In other words, Rousseau argues that through a person's autonomous will, along with the rest of the population, consents to being governed by an authority for the benefit of the entire community. In conjunction, the ideas of Locke, Montesquieu, and Rousseau flipped the power dynamic of the traditional divine right philosophy on its head. Morse writes, "That the heterogeneous Spanish American realm was for three centuries relatively free from civil strife and separatist outbreaks must largely be explained by a steadfast loyalty to the politico-spiritual symbol of the crown" (Morse, 1954). The Spanish Crown's legitimacy was ensured by the approval of the Catholic God, whose will was difficult to determine by the average lay person. Yet the idea that the legitimacy of the government rested in the hands of the people was very appealing, especially given they were displeased with their situation.

The Spanish colonists were not the only ones reexamining their relationship with authority. As Charles Blake writes in *Politics in Latin America*, "Political change was in the air on the world scene: both the U.S. Declaration of Independence of 1776 and the French

Revolution of 1789 called for the establishment of a republic, thereby ending monarchical rule" (Blake, 2008, p. 23). The British colonies in North America and the French both overthrew absolute monarchies in the second half of the eighteenth centuries, and subsequently constructed constitutions which would enshrine the writings of Locke, Montesquieu, and Rousseau by ensuring the rights to life and liberty and establishing the people as the source of legitimate power.

II. Social Context

Social order in the colonies was stratified, allowing for limited mobility, especially since so much of the hierarchy depended on ethnicity. While Queen Isabel's philosophy offered "the political and social hierarchy to be energized at every level and in every department," reality looked different (Morse, 1954).

From a racial perspective there were several different identities: white *peninsulares* from Spain, various indigenous populations, and black slaves brought from Africa. Over time the increasing prevalence of mestizos, or people of mixed Spanish and indigenous ethnicities, mulattos, or people of Spanish and African decent, and zambos, people of indigenous and African decent, resulted in considerable ethnic diversity. Spanish America increased in racial and ethnic diversity throughout the Crown's rule, and attempts were made to classify and stratify each variation, as depicted in the eighteenth century painting titled, *Las castas,* which depicts sixteen different racial mixings and labels them, including one depiction captioned "No te entiendo" or "I do not understand you". This painting highlights both the complexity of the diverse population, and the attempts that were made to relegate groups to their own corner of society.

The unique class of 'creoles' or Spaniards born in the Americas to families of status, were a people born into an identity crisis. While they held more privileges and power in society compared to the native populations, "creoles rarely received the prestige and the economic and political opportunities that were officially assured to them" (Mörner, 1967). The highest class belonged to Europeans who moved from the peninsula to the Americas. Creoles were often caught between being of 'superior' Spanish decent, yet identifying more as American than a peninsular. As Peter Villella describes in his book *Indigenous Elites and Creole Identity in Colonial Mexico, 1500-1800*, creoles had a "simmering rivalry" with the peninsular Spaniards who were entrusted with the positions within the royal bureaucracy (Villella, p. 11). Keith Davies explains in *Landowners in Colonial Peru,* the positions within the government were reserved for "someone who had decided to live in Lima" (1984, p. 143). Preferential treatment was reserved for those who were most connected to Spain. The creole's complicated social identity was fueled by their desire to "adopt a distinctly American identity while remaining loyal to the colonial, Hispano-Catholic principles underlying their own elite status" (Villella, p. 11). Being born in the colonies, creoles were uniquely loyal to both the Spanish Crown and the colonies, but were not given an adequate outlet for this devotion. "The creole identity, then, was based not on ethnicity or culture – which they shared with peninsular Spaniards – but rather a sense of grievance: They suffered a painful disjuncture between their second-tier status and their loft self-understanding as the descendants of the conquerors" (Villella, p. 12). Creoles were prevented from serving in the highest positions of their government which was in conflict with their desire to continue the family legacy. This tension found its release in their political ideology and fight for greater autonomy which will be explored in the coming chapters.

The differentiated treatment based on race and wealth resulted in classes of people with varying interests. The social relations were as complex as the population was diverse, with suspicion and distrust prevalent, "If the creoles feared the Indians, the *peninsulares* distrusted the creoles, and for this reason it was rare for a creole to obtain a senior commission" (Bethell, 1997). The tensions grew as the creoles lost their foothold with the policy changes under the Bourbon rule. Creoles lost powers they had once enjoyed when the Crown was a more distant power, and the creoles had been allowed the opportunity to shape policies in the audiencias.

In seeking upward mobility, creoles often married *peninsulares*, and they purchased titles as a means of self-ennoblement. Simón Bolívar participated in this trend, marrying a woman from Madrid. The resultant oversaturation of titled nobility diluted the true meaning and authority that should have come with being made legally white. In Mark Burkholder's "Title Nobles, Elites, and Independence: Some Comments" he writes, "Most of Mexico's titles at Independence were of recent creation; almost half had been authorized from 1772 to 1821" (1978). Undoubtedly, creoles existed in a limbo between two continents and two identities.

For the women of the Spanish colonies who were thought to be intrinsically weak and needed protection, marriage was the most desirable status, and were therefore encouraged by her parents to choose a suitable partner early and thereby avoid spinsterhood or the nunnery (Lavrin, 1984; Socolow, 2015). As Susan Midgen Socolow describes in her book titled *The Women of Colonial Latin America*, the Catholic faith was central to life in the Spanish colonies, resulting in a traditional role and set of expectations for women. There were customs for courtship; relationships were deemed suitable not based on romance but on the interests and benefits of the families involved; and the women's family would have been paid a dowry in exchange for marriage. Simultaneously, in an effort to protect women, they were also afforded legal rights in

certain instances and in the likely scenario that her spouse passed away before her and she was financially comfortable, she would be revered as the matriarch of the family and "able to draw on male family members and compadres for advice and service while they ruled their families" (Socolow, 2015, p. 76). Kimberly Gauderman asserts that women in Spanish America were not "sacrificial victims of social order", but were rather semiautonomous with the legal standing to sue her husband in situations where he failed to provide, receive half of his earnings in the (unlikely) event of divorce, and protect herself against an abusive husband (Gauderman, 2003). Of course, the majority of these rights were afforded to women of Spanish decent, but even women of less privileged status were permitted legal standing in select circumstances.

The lower classes of the Spanish empire enjoyed less freedom compared to the *peninsulares* and creoles, yet the native populations and the people of mixed heritage benefited from the humanist policies and their sheer size. The populous nature of these groups endowed them with greater mobility as the outnumbered whites were cognizant of their delicate situation. Mörner notes, "mestizos, mulattoes, Indians and Negroes, on the contrary, occasionally found a social fluidity that they could not officially have expected" (1967). Cova's "Colonial Administration in Latin America" lists the unequal rights offered to the different populations, "Indigenous groups were protected from the Inquisition, paid head taxes, and could not own property as individuals but were the primary beneficiaries of social services in health and education" (1997). He goes on to note that although members of different groups held the same occupations, they held different rights and different obligations. As Joshua Simon illustrates in his *The Ideology of Creole Revolution,* "the Spanish imperial practice of governing indigenous communities through separate Repúblicas de Indios, a form of indirect rule, and the encomienda, a tribute system, not only excluded Native Americans from the colonies' political and civil

society organizations, but also facilitated the extraction of their labor and their forced conversion to Catholicism, giving juridical effect to the elevation of *peninsulares* and criollos over indios, negros, and castas, or mixed-raced Americans" (Simon, 2017). Cova offers that while the people were separated by so much, their Catholic faith was binding, "The only unifying force in a society that was divided by race and privilege was the Roman Catholic Church" (1997). Cova describes the Catholic Church and her clergy to be the buffer between social classes and conflicts, and as an equal distributer of services. Indeed the Church's leaders were instrumental in influencing people to revolt, but describing them as even-handed in distributing privileges, as Cova suggests, appears to be an exaggeration considering the Church favored those with resources over those who drained the Church's. However, I will concede the Catholic faith was a unifying trait among the colonies – a successful tool on the part of *los Reyes Católicos*.

III. Economic Context

The Spanish American colonies were founded on a mercantilist economic structure, which was designed to benefit the highest social classes but primarily the Spanish Crown. The economic structure, albeit advanced and meticulous, took advantage of the colonies. "The Latin American economies were founded on a basis that was rapacious and exploitive. Under the prevailing economic theory of mercantilism, the colonies of Spain and Portugal existed solely for the benefit of the mother countries. The considerable gold, silver, and other resources of the colonies were drained away by the colonial powers" (Wiarda & Kline, 2018). The colonies harvested and exported the raw natural materials, only to import them from Spain in the form of a refined good: "the crown sought to maximize the investment… so as to create a favorable balance of trade for the metropolis" (Cova, 1997). The colonies served not only as fertile lands to

be exploited, but the people – both indigenous and the implants – served as consumers for Spanish goods. Mercantilism was by no means unique to Spain; rather it is "the force behind all overseas ventures by European colonial powers," but that does not decrease the importance of the implications for Spanish Americans who experienced limited economic freedom under this system (Cova, 1997).

Viceroyalties' economies differed based on their resources. The colonies were initially exploited for the silver and gold which were more desired than agricultural goods, but as the colonies grew more established, the regions' economies varied based on the resources that were specialized in the region. As the colonies were primarily used for their natural resources, the regions' differing terrains resulted in differing exports and thus the classes of people varied. "Southern New Granada and central Chile, for example, were clearly dominated by large landowners. In Antioquia and northern New Spain, miners played a similar role. In Buenos Aires, stratification patterns were largely determined by trade; in plantation areas, like Guayuaquil early on and Cuba after the 1760s, by slave-owning" (Mörner, 1967).

Existing for the benefit of the Crown resulted in burdensome taxes and the heavy oversight of commerce. Among the first people to arrive in the Spanish American colonies alongside the conquistadors, were royal tax officials (Klein, 1998). The collection of taxes was a point of contest among all colonial occupants: "… the tax burdens of the Indian and Spanish creole populations created constant friction between the central state and its various subjects over the nature and quantity of taxes collected. Many of the colonial rebellions contained declarations listing long-standing grievances against all types of taxation" (Klein, 1998). Another point of contention was trade. Trade routes were strictly controlled as there were only four colonial ports, and they were only allowed to trade through a singular Spanish port (Blake, 2008). Reforms to

this economic policy emerged in the second half of the eighteenth century in order to align with the free-trade ideas which were gaining in popularity.

Conclusion

As demonstrated in this chapter, the Spanish Crown was weakened by several developments: the Bourbon's attempts to centralize power coincided with the emergence of increasingly popular thought on the legitimate source of power; the internal turmoil of the creoles who were relegated to the status of second-class citizens in a continent that they felt belonged to them as the decedents of the conquistadors; and the restrictive economic policies that kept the colonies tied upon the Crown. In the coming chapters as I examine the theories of the prominent theorists, the political, social, and economic context of the time period will bring clarity to the discussion.

Chapter 1: Meet the Theorists

The Latin American independence movement was not orchestrated by any singular person, nor in one fell swoop. Rather, this movement spanned decades and included various, often contradictory, perspectives on what the best future for Latin America ought to entail politically. This movement is distinct from the American Revolution, because it did not yield one federation despite Francisco de Miranda and Simón Bolívar's vision for one massive Pan-American state. Instead, the independence movement occurred in various parts at differing rates and in divergent ideological directions. This chapter will focus on four prominent thinkers who also worked as political activists seeking change: Mariano Moreno, José de San Martín, Simón Bolívar, and Agustín de Iturbide. These political philosophers offered an array of written opinions for the political structure of liberated or semi-liberated states.

As the previous chapter provided the political, social, and economic context of the period leading up to the Latin American independence movement, this chapter will provide biographical information about prominent political theorists from the era and explore their writings on their preferred political structures pointing out key characteristics. The subsequent chapter will analyze to what extent these thinkers engaged with and/or promoted the ideals of equality. This chapter is organized by philosopher, beginning with Mariano Moreno, whose birth and death preceded those of San Martín, Bolívar, and Iturbide.

I. Mariano Moreno

Mariano Moreno (1778-1811) lived a relatively short life compared to his counterparts who will be covered in the course of this chapter. However, his work is no less significant in the context of political theory, and his legacy as an ardent creole supporter of liberalism was

influential in the work of subsequent political theorists. On September 23, 1778 Moreno was the oldest child born to Don Manuel Moreno Argumosa and Doña Ana María Valle de Moreno. Don Manuel Moreno was a peninsular hailing from Santander, Spain. After his voyage to the New World was interrupted by a shipwreck in Tierra del Fuego, Don Moreno settled in Buenos Aires where he met his wife and began working for the Treasurer of Buenos Aires. At the time, Buenos Aires did not offer excellent options for schooling, but this did not prevent Moreno from being an outstanding student and scholar.

After finishing at La Escuela del Rey and Colegio de San Carlos, his parents desired for him to continue on to seminary and become a priest. Padre Felipe Antonio de Iriarte, a teacher whom Moreno had impressed at Colegio de San Carlos, arranged for him to attend the University of San Francisco Xavier at Chuquisaca. Padre Iriarte was himself a member of the revolutionary movement, and is responsible for Moreno's formation and continued education (Peterson, 1934, p.453). After his enrollment at the University, Moreno decided, much to his parents' dismay, that he would rather become a lawyer. His sponsors at law school were primarily focused on the liberal views of law and political liberty, which were formative for Moreno's ideology. Within the classroom, Moreno was among men who would go on to be leaders of the independence movement within Argentina (Peterson, 1934, p.458). According to Eugene Wait's 1965 journal article titled "Mariano Moreno: Promoter of Enlightenment", Moreno "gained his most enlightened education" at the home of Don Matías, one of his teachers who allowed him to stay free of charge and have access to his extensive library. The collection consisted "largely of books on religion, science, and literature," and "many Inquisition-condemned books on philosophy and politics" (Wait, 1965, p.381). Moreno read many European and American theorists, among whom were Montesquieu, Locke, Rousseau, Jovellanos, and Jefferson. Moreno translated several

Enlightenment thinkers' works into Spanish. It is important to note that while Moreno translated some theorists' work, he did not wholly endorse it. For example, when Moreno, a devout Catholic and almost-priest, translated Rousseau's *The Social Contract* he did not include the section with Rousseau's commentary on civil religion. Instead Moreno included in his observation that Rousseau "had the misfortune of speaking foolishly on religious matters" (Moreno, 1810). Moreno's commentary points to his upbringing in an oppressive Catholic society where opinions contrary to the Church were harshly punished (Wait, 1965, p.381). Moreno's consumption of Enlightenment thinkers and his surroundings resulted in his "admiration for a system of government which was built on the firm basis of popular sovereignty" (Peterson, 1934, p.459).

Following his graduation from law school in 1804, Moreno briefly practiced law in Alto Peru before moving his family to Buenos Aires starting his own law practice. He quickly gained notoriety and served as a law advisor to the cabildo of the viceroyalty. As Wait writes, "[his public service] gained him renown and experience as a man of authority in the city" (1965, p.362). The May Revolution of 1810 was launched in response to the Peninsular War between Spain and France over Napoleon Bonaparte's invasion of the Iberian Peninsula. In response to the revolution, a provisional junta replaced the Spanish officials and Moreno was named the secretary of military and political affairs. He served in the junta along with Manuel Belgrano, a significant actor in the Latin American independence movement who focused on the political economy. In Moreno's role as secretary he was granted a vote, and he was responsible for editing the newspaper *La Gaceta de Buenos Aires,* and later *El Correo de Comercio,* both of which were used strategically to bolster support for the junta and create a unified vision of the viceroyalty's future. Wait writes, "His role as editor of the *Gaceta de Buenos-Ayres* not only furthered the

objectives of the junta but it established him as the leading promoter of the ideas of the Enlightenment in Buenos Aires" (1965). Among the ideas Moreno promoted, his *Representación de los Hacendados* (1809), a petition to the viceroy on behalf of the *hacendados*, or landowners of Río de la Plata advocated for the allowance of free trade between the colonies and Britain. While scholars have contradicting opinions regarding the petition's subsequent impact on the start of the revolution, it provide insight to Moreno's critique of the mercantilist economic system imposed by the Crown on the basis of the ideals of liberalism.

His liberal political theory can be seen in a series he authored titled, "The Spanish Patriot" which outlined many progressive ideas for a national constitution. He endorsed the idea of popular sovereignty and referred to Rousseau's work in *The Social Contract*. While he advocated for the citizen involvement in the government, he was careful to limit it to the educated. Moreno even went so far as to suggest that capital cities where the population of educated citizenry was higher should have representation weighted in their favor. A subsequent series explored the idea of a federated republic like the United States of America, but Moreno was not convinced that South America should be united, as they were separated by too great a distance and differed too greatly in priorities. However, he did not rule out the idea completely and left the door open to it being an option in the future.

Moreno was strongly in favor of creating a constitution that would give Río de la Plata greater agency and autonomy and return control to the educated citizenry. In 1810, Moreno was tasked with writing the operational plans for a provisional government of Río de la Plata in which he discussed the manners in which the government would need to address issues and operate to establish international relationships. Moreno came into conflict with Cornelio Saavedra, leader of the junta. While they shared the goals of an independent Río de la Plata, they

disagreed on the speed at which they should work towards it. Moreno favored a more energized approach that would require the "draconian" employment of spies and fierce punishment of opponents (Peterson, 1934, p.430). Saavedra and his supporters, were more conservative in their pursuit of separation from Spain, preferring a gradual transition to independence. Increasing divisions led Moreno to resign, which was unpopular among the members of the junta. Moreno's resignation compounded the challenges the discordant junta was already facing as it struggled to operate as a legislative body or executive. Moreno did not stay out of politics for long after his resignation. He approached Saavedra and asked for a diplomatic position to Rio de Janeiro and London. It was while en route to London on March 4th, 1811 that Moreno passed away. Moreno's left behind a legacy as a liberal political theorist who blazed the way for subsequent theorists like José de San Martín to advocate on behalf of liberal ideals in the fight for independence.

II. José de San Martín

José de San Martín (1778-1850) is known for his military prowess and his role in the establishment of political institutions in Argentina, Chile, and Peru. As U.S. President Calvin Coolidge stated during the dedication speech for the statue of San Martín in Washington D.C., San Martín is remembered "like our Washington, one of those seemingly inspired military chieftains who are capable of thinking at the same moment of terms of war and of politics, of the battle field and of the great human forum" (Coolidge, 1925). Aside from his military accomplishments, San Martín is notable for his role in establishing three countries' governments.

On February 25, 1778, San Martín was born to Juan de San Martín and Gregoria Matorras del Ser in Yapeyú (present-day Argentina). His father served as a Spanish soldier and

moved the family back to Málaga, Spain. He briefly attended school in Málaga beginning at the age of seven before following in his father's likeness and beginning his military career in the Murcian Infantry Unit. He fought for Spain in the Peninsular War against France, and in Africa, demonstrating superior military skills.

Despite aiding in Spain's fight against the French, San Martín was more loyal to the Americas where he was born, than to Spain. Embodying the creole spirit, San Martín resigned from the Spanish army and was initiated into the Lodge of Rational Knights, an underground freemason society. Francisco de Miranda was also a member of the Lodge, as he shared in dedication to the pursuit of freedom, justice, and equality (Martinez, 2008). During a trip in Great Britain, San Martín encountered Francisco de Miranda and other South American supporters of independence. Afterwards, San Martín returned to Buenos Aires and offered his military services to the United Provinces of the Río de la Plata. Along with other supporters of Mariano Moreno, who had become a figurehead for the independence movement, San Martín established a branch of the Lodge of Rational Knights in Buenos Aires. The lodge worked to promote liberal ideals in the Americas and included Simón Bolívar and Bernardo O'Higgins as members.

As a result of his superior military skills, San Martín is credited with the successful liberation of Argentina, Chile, and Peru. After liberating Chile, San Martín passed on the opportunity to become supreme dictator, instead choosing to continue his pursuit of a liberated America. Despite attempts to negotiate with the royalist forces in Peru, San Martín had to resort to military action, liberating Peru in 1821. San Martín was appointed the "Protector of Peru", which entitled him to both political and military command of Peru, "…promising Peruvians that he would gladly relinquish both civil and military command as soon as the enemy should be

driven out" (Gray, 1950, p.4). In 1821, San Martín demonstrated his commitment to the ideals of liberty, justice, and equality in his elimination of all forms of legal bondage—including indigenous peoples and slaves (Gray, 1950, p.5). Similar to Moreno's desire to rectify societal ills within Spanish America, San Martín sought to "reform and stabilize social conditions…keeping with the spiritual and universal character of the Spanish American revolutions" (Gray, 1950, p.4).

In a mysterious meeting with Simón Bolívar on July 22, 1822, San Martín left the liberation and unification of Latin America to Simón Bolívar to see through. The two communicated through letters prior to an anticipated meeting in Guayaquil, Ecuador (Masur, 1951, p.193). Both figures were angling for dominion over the territory and came in conflict over the border of Peru and Ecuador. As Gerhard Masur writes in his article on the Conference of Guayaquil, San Martín "saw himself and Bolívar as the arbiters of South American destiny" (Masur, 1951, p.195). The meeting occurred behind closed doors with no written record, so little is known about their conversation. The meeting seemed to signify Bolívar's military superiority over San Martín. Following the Guayaquil Conference, San Martín left Peru, resigned from his position in the army, and moved to France in 1824.

San Martín's decision to remove himself as a contender for an executive role demonstrates a strong commitment to the success of the newly liberated countries. After dedicating his life to the implementation of liberal ideals, he excluded himself from politics and the military, instead residing in France with his daughter until his death on August 17, 1850. Statues of San Martín adorn plazas around the world, pointing to his lasting legacy as the "…patriot, statesman, immortal contributor to the founding of three Republics" (Coolidge, 1925).

III. Simón Bolívar "El Libertador"

Simón Bolívar is arguably the most recognizable figure of the creole crisis and independence movement. He is the subject of statues around the world and has even found his way into modern art. While San Martín fought for the independence of the southern cone of South America, Bolívar focused on the liberation of what would become Bolivia, Colombia, Ecuador, Panama, and Venezuela. His role in the independence movement and subsequent political involvement earned him the title "El Libertador", or 'the liberator'. He is also referred to as the George Washington of Latin America, as he played a formative military and political role in the establishment of the government similar to Washington.

Bolívar was born in Caracas, New Granada which is current day Venezuela, on July 24th, 1783. He was the youngest child in a family of notable social stature. His family was Basque, but as a seventh-generation American, he was definitively creole (Lynch, 2007). His father, Juan Vicente Bolívar y Ponte is described in John Lynch's *El Libertador: Writings of Simón Bolívar*, as a "creole planter and militia colonel and heir to the tile of marquis of San Luis" (2007). His mother was also a part of the colonial aristocracy, but passed away during Bolívar's youth in 1792. The family had accumulated significant territory over the course of their occupation of New Granada, which came to include "land, mines, several plantations, cattle, slaves, town houses, and a leading place among white elite" (Lynch, 2007). His family's social status informed Bolívar's perspective of the republican ideal as is later visible in his perspective on how inclusive the governments of the newly liberated countries should be.

After both of his parents left him orphaned before adulthood, he was cared for by his maternal uncle, Carlos Palacios. Keeping in tradition with his family, Bolívar joined the colonial militia, "the White Volunteers of the Valley of Aragua, which had been founded by his

grandfather and commanded by his father. Here his natural powers for leadership emerged, and he was promoted to second lieutenant" (Lynch, 2007). Between 1799 and 1802, Bolívar studied in Spain, at which point he was under the care of another uncle on his mother's side, Esteban Palacios. Bolívar's education was consistent with his counterparts as it was heavily influenced by the ideas of the Enlightenment. One of his tutors, Andrés Bello, went on to become the first rector of the University of Chile, while his other tutor, Simón Rodriguez was a student of Jean-Jacques Rousseau (Masur, 1948). Bello played a key role in the formation of Bolívar's ideology around the revolution.

Following the death of his wife, Bolívar, overcome by grief, embarked on a second trip through Europe. During his trip he witnessed the coronation of Napoleon Bonaparte in France and then again in Italy. Feeling Napoleon had betrayed the republican ideals in his conquest of Europe, Bolívar vowed to liberate South America. On his way back to New Granada in 1806, he stopped in Charleston, South Carolina and traveled through major American cities before returning to Venezuela. Similar to José de San Martín, Bolívar came in contact with other proponents of Spanish American independence during his travels, and was initiated into the Lodge of Rational Knights, which were formative experiences that influenced Bolívar's political philosophy.

Bolívar's identity as a creole played heavily into his contributions to the independence movement as he sought the increased autonomy of Latin America. His ascent to the global stage was rather "dramatic" as described by Maureen Shanahan and Ana María Reyes' book "Simón Bolívar: Travels and Transformations of a Cultural Icon". Up until the Napoleonic invasion of the Iberian Peninsula, Bolívar maintained a minor role (Lynch, 2007). It wasn't until Joseph Bonaparte was named King of Spain and its colonies that Bolívar seriously joined the resistance

movement. In 1810, following Caracas' independence, Bolívar traveled on a diplomatic mission to Britain to garner financial support for the independence movement. On July 5, 1811, the Patriotic Society of Caracas, which Bolívar led, declared independence from Spain and established a new republic of Venezuela. The first republic of Venezuela's constitution formally recognized all races as equal, separated from the Catholic Church, and established a federated structure. But, in actuality, people of different races were not treated equally—slavery was not abolished, and landowners were the only ones able to vote and received preferential treatment over non-landowners (de la Cova, 1997). The first republic fell to the invasion of Spanish forces in 1812.

While in Cartagena following military defeat, Bolívar published the Cartagena Manifesto which was addressed to the public and outlined from his perspective what went wrong in the First Republic and how they could avoid the same failure going forward. He attributes the primary reasons for the First Republic's collapse to the lack of Spanish America's preparation and the "political virtues" of republicanism to have not been properly prepared for a federal system (Bolívar, 1813). According to his Manifesto, "Thus we were given philosophers for leaders, philanthropy for legislation, dialectic for tactics, and sophists for soldiers. Through such a distortion of principles, the social order was thoroughly shaken, and from that time on the State made giant strides toward its general dissolution, which indeed, shortly came to pass" (Bolívar, 1813). Bolívar blames the *peninsulares* who failed to support the fledgling government and the allowances made for those who participated in treasonous activities.

His most well-known and analyzed publication is his Carta de Jamaica (1815) which he sent from Kingston, Jamaica during his exile following a civil war that began after the formation of the Second Republic. This "letter from Jamaica" detailed his vision for a Pan-American

republic with a parliament modeled after Great Britain's and a life-long president. In his letter, Bolívar states that South America should, "not adopt the best system of government, but the one that is most likely to succeed" (Bolívar, 1815). In collaboration with San Martín in the South, Bolívar decided to confront the royalist armies and establish independent governments in the North (Cova, 1997). Beginning in 1817, Bolívar began his siege in the West taking Angostura, Argentina.

December 17th, 1819 brought the establishment of the Republic of Colombia by the Congress of Angostura. Through 1821, Bolívar worked from West to East across New Granada to achieve his vision for a united South American state, a vision he called "Gran Colombia". The Congress of Cúcuta constructed a constitution that was used for eight years with the following major principles:

- Adopt centralism as the new form of governance
- The legislative power would be represented by a bicameral legislature
- The executive power would be exercised by a president and vice president
- The judicial power would be held by the high court, the tribunals, and the judges
- Roman Catholicism would be the established religion of the state
- Bolívar would be president, Santander would be vice president, and Bogotá would be the capital (Constitution of the Republic of Colombia, 1821)

Following San Martín's departure from South America, Bolívar attempted to name himself dictator in 1828 after a failed revision of the Colombian constitution. A subsequent assassination attempt resulted in Bolívar exiling his vice president Santander, whom he suspected of orchestrating the assassination. Monarchical sympathies bubbled to the surface in 1829 which resulted in Bolívar resigning from the presidency and making plans to leave for Europe, but on December 17th, 1830, Bolívar passed away in Santa Marta, Colombia. Bolívar zeal for a united republican Pan-American state was never realized, even Gran Colombia

dissolved within months of his death. His attempts at creating a massive liberal republic were not successful due to his inability to unite the diverse interests.

IV. Agustín de Iturbide

Agustín de Iturbide, contrasting with the previous theorists, was a royalist who fought for a relationship with Spain—a separation more so than an independent New Spain. Also a creole, he came from a Spanish family but was born in Valladolid, New Spain, found in present-day Mexico. According to the American Catholic Historical Society's report on Agustín de Iturbide, his father, Don José Joaquín left Spain in 1766 from his ancestral home in the Kingdom of Navarra, "There he prospered, so that, a few years after his arrival in New Spain, he owned a fine hacienda, and two houses in his adopted city, where he had been made a life-member of the city council, and in 1780 its presiding magistrate" (De Iturbide, 1915). Iturbide's upbringing as a member of a wealthy family that directly benefited from Spanish rule was influential in his later political views.

Unlike previous thinkers, there are varied accounts as to the quality of his education, some describing it as "the best that his day and province afforded" and others describing it as the "rudiments of an education" (De Iturbide, 1915 & Robertson, 1947). Regardless, he was educated in a seminary in Valladolid, New Spain. Iturbide went on to earn high-ranking positions within the Regiment of Valladolid. Much like the Bolívar, Iturbide was an influential actor in the military. However, Iturbide was unique among these thinkers, as he fought in favor of the Viceroyalty of Mexico against the well-known priest Don Miguel Hidalgo-Costilla, who led an insurrection for independence which Iturbide was invited to join. Don Hidalgo, as he is commonly known, offered Iturbide a high-ranking military position in the fight against the

Spanish Crown. When Iturbide turned down that offer, Hidalgo asked for him to remain neutral so he and his family would be spared from death and their property from pillage. Yet Iturbide responded that he was "not to remain an idle spectator in the ills that afflicted society" (Iturbide, 1812,).

After the Spanish Constitution of 1812 sought to create a constitutional monarchy, establish popular sovereignty, and limit the power of the Church, Iturbide and other conservative creoles felt threatened by the shifting power dynamics. After being appointed the commander of the royalist Army of the North in 1815, Iturbide was accused of maladministration and forced into retirement by the viceroy. This unsubstantiated accusation, coupled with the outstanding debt that was owed to him by the viceroy, led Iturbide to grow skeptical of New Spain's reliance on the Crown which was increasingly influenced by liberal ideology. As Brian Hamnett details in his 1980 article, *Mexico's Royalist Coalition: In Response to Revolution 1808-1821,* royalists were threatened the by the Crown's attempts to appease the revolutionaries with promises of greater rights and egalitarian practices. For *peninsulares* and creoles who more fully enjoyed rights compared to natives and people of mixed decent, this was troubling and fueled their fight for self-rule. Royalists ironically are credited with winning the Mexican War for Independence in 1821 in an effort to maintain control and their elevated status. Iturbide played a decisive role in this victory when he suppressed the revolutionary, Vicente Guerrero, and his guerilla forces.

Iturbide is also credited with the Treaty of Córdoba, which ratified the Plan de Iguala. This made Mexican independence official and named Iturbide council president. According to the DeGoyler Library's notes on Iturbide, "Executive authority was vested in a five-member regency until a permanent head of state could be installed. Iturbide was also designated as one of the five regents. In recognition of his services in securing independence, Iturbide was given the

titles of generalissimo and admiral" (DeGoyler, 1980). The Plan de Iguala came to be known as the Plan of Three Guarantees – the guarantee of an established Roman Catholic religion, independence from Spain, and the leadership of a hereditary Spanish prince, ideally Fernando VII. These guarantees benefitted the clergy and conservative upper classes more so than Mexico as a whole. When the search for a Bourbon prince to occupy the throne in Mexico was unsuccessful, Iturbide was crowned emperor on July 21, 1822 and declared the first constitutional emperor of Mexico. He held that position from 1822 until 1823 when he resigned due to the mounting pressure from opposition. Unfortunately, Iturbide's brief term in the executive was not Mexico's only short-lived government—the first forty years (1821-1861) of Mexico's statehood included more than fifty governments, each of which lasting no more than one year (Blake, 2008, p.320)

Following a short exile in Italy and England, he returned to Mexico where he thought he would be welcomed by his supporters who disliked the federal republican government. During his trans-Atlantic journey, and thus unbeknownst to him, a proclamation was released that he would not be allowed back in Mexico and promised that any attempt to enter would result in his arrest and death. And so, on July 19th, 1824 he was executed by firing squad.

In conclusion, Mariano Moreno, José de San Martín, Simón Bolívar, and Agustín de Iturbide occupied different, yet notable positions in the Latin American independence movement. Their identities as creoles, Catholic faiths, and social classes informed their world view and political theory. They each played significant roles in the events that liberated the Spanish colonies and established the first governments in Latin America. While each of their political careers ended in either exile or plans for exile preceded by death, their work to spread

the ideals of liberty, justice and equality has resulted in tenents that these liberated countries still seek to pursue.

Chapter 2: In Terms of Equality

Equipped with an understanding of each theorist's background and role in the independence movement, we can now examine to what extent these political theorists engaged with and/or promoted the idea of equality for creoles, women, and people of color. As each theorist was well-educated and exposed to the works from the Enlightenment, they would have been familiar with the cornerstone ideals of freedom and equality. Knowing their education and active roles in the independence movement, we can reasonably assume Moreno, San Martín, Bolívar, and Iturbide were exposed to and agreed with the ideals with the Enlightenment. After all, the quest for independence was fueled by a dissatisfaction with the system of oppression. However, even in Europe where the Enlightenment fueled the Glorious and French Revolutions, the ideals of freedom and equality were not implemented perfectly. Practical application of idealistic visions cannot be expected to be translated seamlessly.

It is worth establishing what liberalism means, and specifically what it would have meant in the context from which these four theorists emerged. The Enlightenment promoted ideals of equality and liberty in systems of governance in an effort to limit the power of government. Latin American liberalism in the nineteenth century was less concerned with a unified political theory, and more concerned with institutional changes that would result in liberation from the Spanish Crown. Liberalism in the Spanish colonies came to encompass both Bolívar's vision for a Pan-American republic and Iturbide's vision for a constitutional monarch because they were primarily focused on distancing the Americas from the Crown (albeit for divergent reasons). The theorists were primarily engaged with the ideas of the Enlightenment to justify their political ends, and less engaged in "systematic theorizing" (Rivera, 2016). The Spanish Crown was no longer revered as the sole source of authority, and the rule of law and popular sovereignty

emerged as important mediators. Republicanism became the preferred institutional designed for many liberal thinkers because it struck a balance between limited governmental power and legitimacy from the electorate. However, a moderated constitutional monarchy was considered legitimate by some, including prominent European thinkers, because the monarch would not wield unlimited authority.

Even though the ideals of liberalism were not fully secured in Latin America, it is still important to examine to what extent these four theorists desired and attempted to create equal and free societies. These change-makers sought more inclusive institutions that would allow for their own voices to be heard and valued. But were these theorists concerned with the inclusion of all voices? I argue that to varying degrees, these theorists, with the exception of José de San Martín, were more interested in securing their own place within the system than equally including less privileged members of society.

I will examine equality in the context of institutionalized inequality, inequality among races and religious liberty. As discussed in this paper's literature review, in this context a woman would not have been considered a man's equal. Consistent with other Enlightenment figures, women and people of color were regarded as naturally inferior. So it is no surprise that none of these theorists seek to include any non-male voices in their political structures. However, they do express their opinions on the abolition of slavery which would require the recognition of non-white males as deserving of freedom.

I. In Terms of Institutionalized Inequality

Fundamental to the independence movement was the pursuit of freedom from tyrannical governments. This motivation resulted in the rejection of monarchs who maintained their

authority on the basis of divine right. While each of the four theorists supported, and some even drafted, constitutions that enshrined the ideal of popular sovereignty, Iturbide and Bolívar supported hereditary components. Iturbide included the need for a moderated constitutional monarch in his *Plan de Iguala,* and ideally, the monarch would be a descendant of the Bourbon family. While a hereditary executive can achieve stability and also serve as a source of legitimacy, a hereditary component maintains the belief that some people are born more important than others. While it is difficult to assess Iturbide's exact ideas and preferences due to the *Plan de Iguala's* vague nature, one can gather that he believed having a member of the Bourbon family as an executive was critical to the founding of an independent New Spain. Iturbide included in the *Plan de Iguala* that if Fernando VII was not able to fill the position of Emperor of New Spain, then any other individual from the ruling family would be suitable. This signals the importance Iturbide placed on having the new state legitimized by a recognized source of authority. Additionally, hereditary representatives are not accountable to the citizenry. Even if the monarch is moderated by a constitution, as Iturbide proposes, the hereditary nature is inherently oppositional to the ideal of equality. As a royalist, Iturbide likely advocated for a hereditary monarch because under the same logic, Iturbide's own status as an aristocrat would have gained favor in a political system that benefits notable families. Additionally, Iturbide likely sought to legitimize the government of. Since the monarch would only be used as a figurehead while Mexico and Spain would be ruled by separate legislatures, the member of the Bourbon family would have been a legitimate source of authority through their divine selection as a royal. San Martín was open to the possibility of a hereditary monarch as he proposed the idea of a constitutional monarchy led by a European prince to the Viceroy of Peru. While the Viceroy rejected this proposition, San Martín's endorsement of this as a viable option suggests

he was not opposed to the hereditary aspect of a monarchy, so long as it was moderated by a constitution.

On the other hand, Bolívar rejected a hereditary executive, instead advocating for a hereditary chamber in the legislature. Bolívar envisioned an executive that would be elected for a life-long term and a parliamentary system similar to England's (Bolívar, 1815). England's parliament features two chambers; the House of Lords is comprised of hereditary representatives and the second, House of Commons, is democratically elected. Contrary to Bolívar's insistence in his Address at the Congress of Angostura (1819), this approach to a legislature that features a representative chamber and a hereditary chamber does not enshrine the ideals of equality. Bolívar states the hereditary senate would serve as "a counterweight to both government and people; and as a neutral power it will weaken the mutual attacks of these two eternally rival powers" (Bolívar, 1819). By featuring a chamber of elite ruling families, Bolívar maintains that some families are of greater political importance and are unaccountable to all citizens. He states in his address, that he is not attempting to establish a ruling noble class, for that would "destroy equality and liberty", and yet, a hereditary senate is not wholly accountable to the people as they cannot be elected or voted out (Bolívar, 1819). While the bicameral legislature does allow for non-hereditary members to have a voice in policy decisions, by nature it does not enshrine the ideal of equality among all people. This system would have benefitted the elite class already empowered by the current system of governance, as it establishes a tangible divide. Bolívar goes further to state that "All should not be left to chance and the outcome of elections," signaling his distrust in the voters. Bolívar's hereditary senate would be a tool to insulate against the whims of public opinion but also to prevent the full participation of non-elites.

A point of distinction between Iturbide and Bolívar's visions for hereditary aspects of governance is Bolívar's rejection of a peninsular power. In his *Carta de Jamaica,* Bolívar writes, "we must provide ourselves in order to expel the Spaniards and to found a free government" (Bolívar, 1815). While Iturbide believed the new state's legitimacy must originate from a Spanish prince, Bolívar intended to establish a wholly separate, sovereign government. Bolívar likely sought an expulsion of the Spaniards to create more space for creoles within positions of leadership. As Iturbide personally benefitted from a system that recognized aristocrats such as himself, he sought a system tied to the societal order of the Old World.

Moreno was also concerned with the presence of royalists in his new state. Moreno sought to address the potential for usurpation by loyalists through a Machiavellian hardline approach. In Moreno's *Plan de Operaciones,* he names three distinct groups of people on the basis of their perceived loyalty to the Provisional Junta. The groups were 1) those who were defenders or patriots of the government, 2) those who were known or declared enemies, and 3) those who were silent spectators maintaining neutrality. Moreno's *Plan* granted political privileges to patriots, or supporters, of the government while at the same time harshly punishing any outspoken dissenters. It was this hardline approach for squashing dissent that caused the tension between Moreno and Saavedra. Moreno sought to divide society into an 'us' and 'them' and through punishing the 'them' and rewarding the 'us' to encourage loyalty to the new political system. Moreno's *Plan* attempted to establish a system of nepotism rather than one of equality. Article 3 Section 2 outlined the manner in which mayors, commanders, and priests would nominate men in their communities for positions within the government. This mechanism creates a system of creole political appointees rather than one of democratically elected officials. Moreno justified these systems on the basis that the new state lacked a solid foundation for a

constitution to be constructed. From Moreno's perspective, if they were successful in unifying support for the new government then a constitution could be constructed that would restore the rights to the people. Contrastingly, Moreno wanted to eliminate the longstanding tradition in the military that automatically gave the sons of officials the title of cadet and instead advocated for a system that recognized military merit instead. While this measure was eventually supported, it was initially greeted with contempt from the military and led to Moreno's forced resignation. Following Moreno's departure, Saavedra's *Primera Junta* quickly imploded while Saavedra attempted to tend to the military in the North, suggesting Moreno's hardline approach could have been a more effective way of ensuring a lasting government even if it was not inclusive in the short run.

In line with his ultimate desire to return power to the people, Moreno demonstrated his sympathy to the working class when he wrote *Representación de los hacendados* (1809) on behalf of Spanish American landowners. In this letter to the Viceroy of Río de la Plata, Moreno expresses the need to open trade up between the colonies and England. Moreno relies on an argument based in the ideals of liberalism, arguing that the landowners ought to be allowed to sell their products to England and that by limiting their freedom to trade, the Crown is limiting their own prosperity. Moreno demonstrates a commitment to the working class and their right to economic freedom through the course of this persuasive letter. Yet in his *Plan de operaciones,* Moreno promotes an economic policy that would give near total control to the state; even privatization of silver and gold mines would be criminalized. Moreno states this policy would give control to the state so that a bourgeoisie class could consolidate into a stable economic force ensuring the success of Argentina. However, in his proposed system that distinguishes and favors patriots over feared threats, Moreno's proposed economic policy could not have equally

benefited citizens. While one might argue that in the long term all Argentinians would benefit from the economic stability, Moreno's intention to limit participation in the economic sphere did not result in a fair economic playing field. And yet, with the focus on growing the middle class, the economic disparity diminished. In the immediate post-independence period economic inequality declined despite significant disparities between the commercial and governmental elites and the middle classes (A New Economic History of Argentina, 2003, p.33). However, this coincided with increasing social inequality and declining well-being for the lowest social classes which were primarily people of color.

II. Inequality In Terms of Race

On the dimension of race, these four theorists sought to diminish the systemic differences that had been woven into the fabric of society but only to the extent that white elites maintained control of the government. People of color were excluded from representation because that ensured peninsular Spaniards would receive the majority in the Cortes. As men of mixed heritages, they were familiar with the challenges and frustrations that accompany not wholly fitting into spaces, but were set on maintaining control rather than extending political equality.

Iturbide wrote in his *Plan de Iguala* that all the inhabitants of New Spain were citizens of the monarchy and able to find work on the basis of their merit, and he explicitly included Africans and Indians along with Europeans. Of note, is Iturbide's word choice; he used the term "*los habitantes*" or inhabitants. Rather than opting for 'men' or 'property owners', Iturbide chose an inclusive term to refer to anyone, male or female, propertied or not, of any race. Later in Section 13, Iturbide writes every citizen and their property was to be respected and protected by the government (Iturbide, 1821). Yet again, the word choice appears significant as it recognizes

all people as citizens and the equal recipients of respect and protection. Despite these two instances of inclusive language, Iturbide fails to mention women in any meaningful way as either rights holders or eligible voters.

Bolívar, San Martín and Moreno all expressed their desire to abolish slavery while not intending to eliminate the racial political disparity. While these three theorists rejected slavery on the principle of equality like Locke and other Enlightenment thinkers expressed, no one spent time discussing ways to include oppressed Africans or Indians in the new governments they were building. The theorists were challenged in part by the mixed nature of their populations in which many light-skinned creoles supported various theories on the inferiority of people of color. Bolívar abolished slavery in the areas he conquered; however, he lacked a coordinated manner for ensuring this liberation was followed. Bolívar and San Martín offered slaves freedom if they joined in the revolution. Some regions outlawed the slave trade, like Peru and Gran Colombia, yet did not address slavery. San Martín moved Perú gradually towards emancipation through the declaration that all children of slaves were to be born free in the Freedom of Wombs declaration. Black inhabitants were briefly awarded citizen rights but were later overturned. The newly independent Spanish Americas were struggling to construct egalitarian societies as there was considerable hatred between whites and blacks that fueled violence between them. Whites were fearful of the influence non-whites could have if they were fully incorporated into political society. Bolívar's use rhetoric that promising freedom and condemned the enslavement of the colonies to the Spanish Crown capitalized off the labor and energy of people of color. Bolívar further invigorated the non-white population by entertaining the possibility of a unified national identity through race mixing, but his lack of commitment suggests those words were more so a

political tool to achieve independence (Bolívar, 1815). The political elites were not interested in elevating the status of anyone other than themselves.

The inequality among races was not limited to white and black people in Spanish America, but included the fragmented and oppressed indigenous peoples. Those who had not fled to the outskirts of the Spanish colonies had been forced to assimilate but were not afforded many political rights. With the end of colonial rule came the end of self-governance for indigenous populations as these semi-autonomous communities threatened the unitary state approach these theorists were attempting to establish in each of their regions. Bolívar commented that the Indians of New Granada "could be civilized" thereby demonstrating his limited understanding of equality (Bolívar, 1815). Consistent with the time period, these theorists failed to respect cultural differences. Instead they viewed all other cultures as inferior to their own. This mindset was useful in the establishment of an oppressive and centralized colonial system; however, as these men sought to establish governments on liberal ideals of equality and freedom they failed to recognize the validity of indigenous cultures. Their lack of appreciation for differences perpetuated the intolerance towards indigenous peoples that continues today.

III. In Terms of Religious Liberty for Roman Catholics

On the dimension of religious liberty, all religions were not treated equally. The theorists severely limited religious expression to the established Catholic Church and empowered Church leaders. This appears to be a relic from the colonial period, and is a testament to the effective power of the Catholic Church which was able to survive the revolutionary war against an oppressive, despotic government when the Church itself was responsible for much of the

oppression and abuse of power. Part of the Church's successful survival is owed to key actors who helped to lead the revolution, like Padre Miguel Hidalgo, who initiated the War for Mexican Independence. Even though Iturbide won Mexico's independence, Hidalgo is often remembered as the Father of the Nation. This national memory points to the importance of the Catholic Church's leadership in Mexico, and in other parts of Latin America. However, the Church's influence was limited by the strong anticlericalism that accompanied the post-independence period.

During the independence movement the Church, while not entirely uniform, was mostly in favor of Spain maintaining control over the colonies as the Crown held strong ties to the Church. When independence was achieved throughout Latin America, the Church generally preferred the status quo, favoring conservative political, economic, and social policies (J.E.W., 1966). As a tenet of liberalism, official state religions were rejected by prominent thinkers like Locke and Madison. James Madison, who wrote *A Memorial and Remonstrance against Religious Assessments*, was opposed to the establishment of a religion and strongly advocated for a separation of church and state to allow for genuine religious liberty (1785).

The first point of Iturbide's *Plan de Iguala* was the establishment of the Roman Catholic Church and explicitly noted the lack of tolerance that would be shared for any other religion (Iturbide, 1821). As Iturbide was conservative too, it is not surprising he would have established the Catholic Church within Mexico as a nod to the Spanish model. Yet conservatism cannot be the only reason these theorists established the Catholic Church. For San Martín, a liberal supported an established Catholic Church. San Martín established the Roman Catholic Church as the official religion of Peru in Section 1 Article 1 of the Provisional Statute of Government. Article 2 permitted subtle deviance from the established religion, but did not allow for behavior

that would subvert public order. This establishment points to San Martín's awareness of religion as a unifying tool, similar to *los Reyes Católicos* who used forced conversion to create a united identity. Yet, San Martín expands religious liberty to allow for a liberty of conscience whereas that was strictly prohibited by the Spanish Crown.

Bolívar was less fanatic with regards to religion compared to the other three theorists, but he did maintain an established Catholic Church as a way of keeping it from competing with the state for authority. Bolívar discusses religion as a tool of the Spanish Crown used to center power in Spain and establish eternal fidelity in his *Carta de Jamaica* (1815). He goes on to say that the colonies have seen the light and broken free from the shackles that Spain used to control and limit them. Bolívar demonstrates his understanding of religion to be one that restricts behaviors. This perspective differs from the other theorists' who support a strong established religion out of religious fervor. Bolívar does not go so far as to condemn the Catholic Church for its oppressive nature, demonstrating he recognizes the popular nature of the Church while also noting its use as a tool of repression. Just as Bolívar admired the structure of the British government, he also admired the religious liberty that they supposedly enshrined.

IV. In Their Terms of Equality

In comparison to one another, Moreno, San Martín, Bolívar, and Iturbide vary in the extents to which they promoted equality. Their identities as creoles and their desire to secure their own political power limited their efforts to establish governments that were inclusive of all voices. To varying degrees they established institutions that disproportionately represented the interests of the elites over lower class citizens and people of color. As creoles, Bolívar and San Martín were more concerned with protecting their interests from the *peninsulares* who had long

been favored under the colonial system than they were with establishing a truly equal government. Bolívar and San Martín were in favor of continuing the socioracial hierarchy that existed under the colonial system with adaptations that allowed for greater creole participation.

While Moreno lived for the shortest life out of these four theorists, his legacy as a revolutionary thinker inspired other liberal theorists. This makes his impact less clear and measurable. The creation of the freemason group, the Lodge of Rational Knights that San Martín joined, was created in line with Moreno's pursuit of a radically different system of governance. Moreno's hardline approach to liberalism resulted in hostility and arguably his death, but he left behind a legacy that inspired the likes of San Martín who fought for and won independence. Moreno promoted a future that would be more economically inclusive of the middle class. He stopped short of including people of color or women in his vision for an economically strong and independent Argentina. Moreno's efforts to harshly impose a centralized form of government over the diverse interests, signal that he likely would have used his political positions to achieve greater influence.

When considering to what extent these theorists promoted equality, it is important to examine to what extent they personally benefitted from the systems they created. In the cases of Iturbide and Bolívar, both men assumed the most elevated executive positions within the regimes they helped establish. Iturbide became Emperor of Mexico when no members of the Bourbon family accepted the invitation to rule over Mexico. Iturbide and his children were all given titles of nobility with the intention of them eventually assuming the role of emperor. While this transition from leader to Emperor seemed logical from the sense that Iturbide was essentially already ruling Mexico, the move was also contradictory as it did not align with his former argument that the new state needed a legitimate source of authority. Iturbide while respected,

was not a member of the Bourbon family thereby undermining his *Plan de Iguala*. This decision to assume the role as Emperor of Mexico signals that Iturbide's end was actually securing a system of governance that would mimic Spain's so that as a member of an elite ruling class, his privileges would be protected from the increasingly popular liberal ideals. Iturbide's plan ultimately backfired when he was pushed out of Mexico by antimonarchist forces. While Iturbide likely thought that his decision to become the Emperor of Mexico would benefit the rest of Mexico, his judgement was tainted by his belief in a system that benefited the aristocracy over the lower social classes and people of color. Iturbide sought to safeguard his power and ultimately lost it all to liberal forces.

Similarly, Bolívar assumed the role as the first President of Gran Colombia and ruled from 1819 to 1830. Like Iturbide, Bolívar attempted to monopolize the executive authority. Bolívar promoted a legislative system that would institutionalize the upper class's political control. Bolívar was a strong opponent to the rule of the *peninsulares* in the colonies since they lacked the emotional connection to the Americas that he and his fellow creoles felt. Bolívar's motivation in his writings and his military conquests was to expand the system of governance to include creole voices and unite the Americas under a Pan-American banner that rejected Spanish control. Bolívar did not desire equality for all because that too would have subjugated his voice to the more populous indigenous and African populations. Bolívar was unsuccessful in establishing a system of governance over Gran Colombia that was satisfactory and events culminated in the splintering of the union. Bolívar's vision of a Pan-American republic was never realized, and likely would have been disastrous as he sought to glaze over the cultural differences for a federated republic. Bolívar's attitude towards indigenous peoples and his own

power-seeking behavior point towards his desire not for equality for all, but equality for those like him.

Alternatively, San Martín walked away from his position as Protector of Peru after his meeting with Bolívar in the Conference of Guayaquil. His willingness to leave not only his position, but also his country, to ensure a successful establishment of liberal ideals was unparalleled. Modeled after the legacy of Moreno, San Martín sought the economic inclusion of the lower classes and the abolition of slavery, but San Martín went further than the others in sacrificing his own grandeur for the liberation of the colonies. Out of the four theorists, San Martín was the only one to relinquish his pursuit of self-aggrandizement in the pursuit of liberalism. Even Moreno sought to extend his influence after his forced resignation when he requested to be a diplomat.

These four revolutionary figures expanded the definition of equality in the newly liberated Spanish American countries; yet they did not go so far as to fling the door wide open to include everyone. As highly educated men with access to people and resources, they were influential figures in their communities. At the same time they were highly distrustful of the *peninsulares*, their fellow creoles, and the large population of people of color. Women, people of color, and members of the lower social classes were all systematically excluded from their proposed systems of governance, and the *peninsulares'* access to political resources was weakened. While they sought to include voices like their own in their political institutions, they failed to recognize the common desire from other social identities to be represented and to be allowed to participate in governance. This failure has resulted in the ongoing battles within Latin America for increased recognition of social identities and lessened barriers to political participation.

Conclusion

The Latin American independence movement was a revolt against the Spanish Crown's oppressive governmental structure that systematically rewarded political allies while penalizing any nonconformists. Four key creole theorists—Mariano Moreno, Jose de San Martín, Simón Bolívar, and Agustín de Iturbide—represented varying degrees of liberal political theory inspired by the Enlightenment. After achieving independence in each of their regions, they worked to establish systems of governance that allowed for greater participation among creoles while continuing to exclude the most marginalized—women, people of color, and members of the lowest social classes.

The purpose of this project was to examine the beginnings of the contemporary Latin American states and the people who played significant roles in their establishment. My research was aimed at humanizing these legendary figures whose statues adorn plazas and names are forever etched in history while also providing historical context for the contemporary governmental systems of Latin America. My findings contextualize the current societal reckoning that is taking place as people around the world wrestle with their countries' complex histories and potential paths forward. My hope is that this research will allow for substantive conversations about the extent to which our political histories should be venerated.

This research falls short as an expansive examination of political theory from Latin America at the time of the independence movement. In terms of the number of theorists I included, Moreno, San Martín, Bolívar, and Iturbide are but a few of the figures that played significant roles in the liberation and subsequent establishment of governments in Latin America. Additionally, my research could be expanded upon to include the role of the Jesuit priests and brothers who advocated for improved conditions for indigenous persons long before the

independence movement. I briefly discussed the role of Fray Bartolomé de las Casas in this project, but his voice was joined by several other prominent figures in the Catholic Church who spoke out against the oppressive nature of the Spanish Inquisition long before Moreno, San Martín, Bolívar or Iturbide emerged. Examining the political theory of Church leaders leading up to the independence movement would provide a clearer understanding of the subsequent theory.

After examining each theorists' writings and demonstrating how to varying extents each failed to include others in the systems of governance, I am encouraged by the relentless pursuit of more inclusive governance. While there is still a long way to go on so many fronts and not just in Latin America, there are radical theorists who, like Moreno, San Martín, Bolívar, and Iturbide, are fighting to ensure they and people like them have seats at the table where the decisions are made. These four men were revolutionaries, and while they failed to open the door to all members of society they were successful in toppling centuries old systems of oppression and forging new pathways for political participation.

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